Profile Details

Profile Details	Normalization & Validation	Match Profile	Set Management Tags	Inventory Information

Profile Details

Use Network Zone	Yes
Profile name *	OverDrive, Import Titles to NZ, Create Local Portfolios (CARLI Template) (copied from NZ)_2024-07-23 19:21:34.43
Profile description	For libraries that purchase OverDrive resources as standalone collections (not the NILRC group). Copy template to your IZ and modify according to instructions at https://www.carli.illinois.edu/products-services/i-share/electronic-res-man/overdrive_local
Originating system *	OverDrive
Import Protocol	Upload File/s
Physical source format	Binary
Encoding format	UTF-8
Source format	MARC21 Bibliographic
Status	Active

File name patterns	
Cross walk	● No ○ Yes
Target format	MARC21 Bibliographic

Normalization & Validation

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Filter

Filter out the data using	ⓘ

Normalization

Correct the data for matching and cataloging using	ⓘ
Change the data for PO line and inventory using	IZ Import 856 to 956 for inventory ⓘ

Validation Exception Profile

Handle invalid data using	MarcXML Bib Import
	☐ Skip records with validation issues ⓘ

Network Zone Records Handling

Import local extensions	● No ○ Yes ⓘ

Match Profile

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Match Profile   ⌄

Match by Serial / Non Serial	● Yes ○ No
Serial match method	[035 (Other System Identifier) Match Metho ▾]
	System Identifier Prefix [(TEFOD)]
Non Serial match method	[035 (Other System Identifier) Match Metho ▾]
	System Identifier Prefix [(TEFOD)]

Match Actions   ⌄

Handling method ● Automatic ○ Manual

Upon match ● Merge ○ Overlay ○ Do Not Import ○ Use NZ Record

Select Action ☑ Disregard matches for bibliographic CZ linked records

☐ Single match - match only record with the same inventory type

(electronic/physical)

☑ Match on title type   ⓘ

MERGE/OVERLAY

Merge method [CONSORTIUM NZ Overlay all fields but loc ▾]

Select Action ☐ Allow bibliographic record deletion

☐ Do not override/merge a record with lower brief version

☐ Do not override Originating System

Community Zone linked records handling [Unlink record from Community Zone and create a local reco ▾]

Do not override/ merge record with an older version ● Disabled ○ Consider Originating System ○ Ignore Originating System

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Automatic Multi-Match Handling   ⌄

Select Action ☑ Disregard matches for bibliographic CZ linked records

☐ Disregard invalid/canceled system control number identifiers

☐ Prefer record with the same inventory type (electronic/physical)

☑ Match on title type   ⓘ

☑ Choose a conclusive action in case the above selected criteria result in multiple records:

○ Skip and do not import unresolved records

● Use record with the latest created date

No Match   ⌄

Upon no match ● Add To NZ ○ Do Not Import ○ Import To IZ

Set Management Tags

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Set management tags for all the records imported using this profile ⌄

Suppress record/s from publish/delivery ☐   Condition **Unconditionally** ▼

Suppress record/s from external search ☐   Condition **Unconditionally** ▼

Synchronize with OCLC **Publish Bibliographic re** ▼   Condition **Unconditionally** ▼

Synchronize with Libraries Australia **Don't publish** ▼   Condition **Unconditionally** ▼

Set record/s cataloging level ☐   Cataloging level **[00] Default Level for** ▼ ⓘ

Inventory Information

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Inventory Operations ⌄

◉ Electronic   ○ Mixed   ○ Physical   ○ None

Electronic Resource Mapping ⌄

Delete/deactivate portfolios ☐

Use Community Zone portfolios ☐

Portfolio type   ○ Standalone   ◉ Part of an electronic collection

Electronic Collection * **OverDrive** ✕ ☰ ↺

Service * **Full Text** ▾

Material type **Book** ▾

◉ Single portfolio   ○ Multiple portfolios

Create inventory only for new bibliographic records ☐

	Field	Subfield	Default Value	
Extract access URL from field	956	u		4#,41,42,43
Extract internal description note from field				
Extract authentication note from field				
Extract public note from field	956	z		
Extract library from field				☰

License   Select from a list   ☰

Activate resource   ☑